



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**January 16, 2018**  
**Prepared by Lisa Sheppard, Director**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2016 actuals  
FY 2017 annual targets  
FY 2017 actuals  
FY 2017 actuals as a percentage of annual targets  
FY 2017 actuals as a percentage of FY 2016 actuals  
FY 2018 actuals to date  
FY 2018 annual targets  
FY 2018 actuals as a percentage of FY 2018 annual targets

**The general target is 50% for FY 2018, July 1-December 31, 2017**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

**Data to note:**

- Meals
  - The number of seniors participating in congregate meal service has already reached the target for the year.
  - Total meals served are above target for this fiscal year and on pace with actuals for last fiscal year.
- Transportation
  - Rides are 9% above target for the year at 59% due to the addition of the GNP commuter during the summer season and an 8% increase in Dial-A-Ride rides over this time last year.
  - Overall rides are down in December from the same time period last year.
  - Excluding the GNP commuter, rides for the year are down 5.6% from this time last year.
  - Fixed route rides, without the addition of the GNP commuter, lag 22% due to a substantial decrease in Kalispell city bus rides (mostly on the PM route).
  - Current planning efforts are focused on restructuring Kalispell routes.
- Independent Living Services. Although we continue to be below target for the number of people served and the number of units of service provided for the year, we are now less than 10% below target.

- Benefits counseling hours are significantly above target due to Medicare Open Enrollment which ran October 15-December 7.

## **AOA Administration**

### ***Budget and Contracts***

- The recent increase in health insurance premiums has been difficult for us to absorb in our aging and transit budgets as all but 4 staff members' premiums are paid with program funds.
- We did not receive a decrease in our base state funding this biennium as part of the recent cuts to DPHHS. However, are still waiting to hear if our provider rate increase will remain intact.
- The Veterans Administration has approved us to begin providing the Veteran-Directed Home and Community-based Services (VDHCBS) program in Flathead County in partnership with the Area VI Agency on Aging. The program is funded by the VA. It provides a monthly allowance to veterans to purchase attendant care and other services they need to stay in their homes and communities. To be eligible, veterans must have been honorably discharged and meet functional need requirements. Initially, Area VI staff will provide VDHCBS services to eligible Flathead County veterans and pay us a monthly fee per enrolled veteran. We will take over service provision at some point in the future when there are enough veterans enrolled to support staff and operational costs. We are still working on billing logistics and final documentation, including a service agreement with Area VI.

### ***State/Federal/Legislative Issues***

- Lisa participated in an M4A conference call on 1/8/2018. Lisa will be unable to attend the next quarterly meeting January 24-25 in Helena.
- Federally, we continue to monitor progress, or lack thereof, on the budget relative to Older Americans Act funding and the potential elimination of the SHIP program that supports us to provide Medicare counseling. We are also monitoring the potential effects of tax reform legislation on services and programs for older adults.

### ***Building***

- The following punch list item related to AOA has not been resolved or repaired to our satisfaction: repair or replacement of the small kitchen freezer. We also plan to monitor the temperature in the dry storage area in the summer as modifications were made too late in the season to know if they were effective in reducing temperatures.
- Flathead County Maintenance completed the repair to the carpet in the AOA as a portion of the contractor's repair was unacceptable.
- We were able to negotiate a replacement refrigerator for the Senior Center Activity Room as the one initially purchased never worked correctly and repairs were unsuccessful.

### ***AOA Advisory Council***

- The Advisory Council met on January 11, 2018. The next meeting will be held March 8, 2018, according to our new bimonthly schedule.
- Dianne Froment, Director of Welcov Assisted Living presented on ALF services. Other topics included federal and state funding, the county budget process, the VD-HCBS program, an update on the Age-Friendly Flathead initiative, the Eagle Transit 5-year Plan progress, results of Medicare Open Enrollment assistance, and upcoming events.

### ***Other***

- We continue to work on the Continuity of Operations Plan (COOP).

## **Outreach/Education/Media**

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 12/4/17, monthly KGEZ interview, 11,000
- 12/7/17, promotion of AOA programs at the Health Care Coalition, 16 participants
- 12/19/17, provided info on AOA programs to Health Department nurses, 6

## **Eagle Transit**

- Montana Department of Transportation (MDT):
  - 5-Year Transportation Development Planning Grant
    - Staff and Planning Committee members continue to work on data gathering and analysis relative to reconfiguration of routes/services in the Kalispell area.
    - The next Planning Committee meeting is set for 2/1/2018.
  - FY 2019 Transportation Coordination Plan, 5311 Application and Capital Request
    - We prepared and have begun to distribute the Eagle Transit Annual Summary report that includes information about organizational structure, funding/budget, services, eligibility, fares, vehicles and planning efforts.
    - Results from the annual survey have been tabulated.
    - We've made follow-up phone calls to all private providers encouraging their participation in the TCP process. We met with Rocky Mountain Transportation on 1/12/18 regarding enhanced coordination of transit services with the Snow Bus and seasonal commuter service to Glacier National Park.
    - We've updated the description of all transportation services in the Valley.
    - We've updated Eagle Transit vehicle information.
    - We've calculated the annual trip purpose statistics.
  - The second quarter program and financial reports are due January 30, 2018.
- Outreach/Education/Media/Special Events:
  - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
  - We facilitated the annual public input meeting on December 6, 2017. Attendees included 25 members of the public and 5 staff members.
  - We provided transportation to the annual Christmas at Our House dinner. A schedule was published in the Daily Inter Lake on 12/9/17.
  - We created a new ad, as required by federal regulations. It will run monthly in the Daily Inter Lake starting in January.
- Operations:
  - We have had to rely heavily on contracted employees to fill shifts due to drivers on extended leave.
  - We are in the final stages of selecting a vendor for the onboard cameras approved as part of our FY 2017 capital request.
  - We received the contract for a new 27 passenger bus that was approved as part of our FY 2017 capital request and should receive the bus itself shortly. We anticipate receiving a contract for two new 13-passenger buses in May, with the buses arriving sometime in July.
- Transportation Advisory Committee (TAC)
  - The Committee met on January 4<sup>th</sup> to discuss the FY 2019 Transportation Coordination Plan. It will meet again on February 1<sup>st</sup> to review and vote on the final TCP, the 5311 application and the capital request.

- Glacier National Park
  - MDT and the National Park Service have postponed release of ownership of 6 Optima buses to Flathead County until we can determine an acceptable option for sale/disposal.

### **Nutrition**

- Our annual Christmas meal was served December 22<sup>nd</sup>.

### **I & R/Assistance/Ombudsman**

- As part of the new BEC grant, IT is going to create a new website for AOA. We are having our first meeting on the site this week.
- Monthly Medicare 101 classes will resume this month on January 23<sup>rd</sup>. Classes will be offered the 4<sup>th</sup> Tuesday of each month from 1:00-3:00 pm.
- Staff are now taking appointments to assist older adults to apply for the homeowner/renter tax credit (2ECs). You have to be at least 62 years old with a household income of \$45,000 or less. Refunds of up to \$1,000 are based on the amount of property tax or rent paid and can be applied for up to 5 years retroactively.
- The Age-Friendly Flathead Steering Committee will meet January 18<sup>th</sup>. Our strategic planning meeting is scheduled for February 17, 2018.
- The Flathead County Animal Shelter donated 100 pounds of pet food, toys, beds and leashes for AOA clients. The items were gone within days of making them available and were very much appreciated.

### **RSVP**

- Grant update: The final FFR is due. We still cannot access the federal online system.

### **Senior Mobile Home Repair**

- The Advisory Board met on 12/12/17. Four (4) projects were completed. 19 were in progress.
- The Advisory Board met on 1/9/18. One (1) project was completed. 21 were in progress.
- A \$10,000 donation from Oro y Plata was received on November 30<sup>th</sup>. Other recent donations include \$1,000 from Church Women United and \$500 from the Kalispell Rotary.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- We are in the process of updating all service agreements with area senior centers. AOA have staff have met with the Kalispell Senior Center, Bigfork Community Center and North Valley Senior Center boards. A meeting with the Whitefish board is scheduled for January 18<sup>th</sup>.
- Work is almost complete on the CDBG project to update the Whitefish and North Valley senior centers.
- We continue to look at options for a new building for the Bigfork Community Center.
- Whitefish is holding a membership drive in January. They are offering a weekly chronic disease self-management class for six weeks starting January 9<sup>th</sup>. They have also added Wii bowling to their activity calendar.
- The Kalispell Senior Center has several speakers lined up for January, including a warden from Fish and Game and an investigator from Adult Protective Services, as well as a performance by Rick Hagen and the Accordion Friends and a movie showing on the 18<sup>th</sup>.



# January 2018 Report: Performance Measures Tables -December 2018 stats (FY 2018)

50.00%

MEASURE	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 2017 as % FY 2016	Dec	Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
# Receiving Independent Living Services	447	400	178	45%	40%	not yet available	80	80	233	34%
# Receiving Meals on Wheels	471	450	470	104%	100%	12	282	294	465	63%
# Seniors Receiving Congregate Meals	867	980	1,785	182%	206%	78	932	1,010	1,000	101%
# Eagle Transit DAR Unduplicated Riders	502	500	401	80%	80%	14	259	273	500	55%
% of Service Recipients at Moderate to High Risk of Institutionalization	94%	88%	89%	101%	95%	90%	91%	90%	88%	102%
Per Meal Cost of Nutrition Services	\$6.30	\$6.50	\$6.89	106%	109%	\$5.92	\$5.70	\$5.92	\$6.75	88%
% Overall Satisfaction with AOA Services from Annual Survey	N = 98%, IL = 95%	95%	N=99% IL-96%	100%	100%	N/A	0%	N/A	95%	100%
Maximum annual number of transportation complaints	27	36	30	83%	111%	1	3	4	36	11%
WORKLOAD INDICATOR	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 17 as % FY 16		Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
<b>Outreach/Education/Media</b>						Dec				
Public Outreach/Education/Media Efforts	153	120	123	103%	80%	3	56	59	120	49%
<b>Nutrition</b>						Dec				
Total Meals	78,541	82,000	82,428	101%	105%	6,780	33,997	40,777	79,000	52%
MOW	49,283		49,695	N/A	N/A	4,131	19,777	23,908		
Congregate	29,258		32,733	N/A	N/A	2,649	14,220	16,869		
Nutritional Assessments Conducted	1,451	1,550	2,424	156%	167%	117	989	1,106	1,550	71%
<b>Transportation</b>						Dec				
Total Ride Count	91,196	94,000	85,305	91%	94%	7,439	45,618	53,057	90,000	59%
Dial-A-Ride Count	30,644	31,020	30,025	97%	98%	2,479	12,956	15,435	30,000	51%
City, Commuter and Other Ride Count	60,552	62,980	55,280	88%	91%	4,960	32,662	37,622	60,000	63%
Eagle Transit Outreach/Special Events	8	10	40	400%	500%	3	13	16	15	107%
<b>Information and Referral/Assistance</b>						Dec				
Info and Referral/Assistance Contacts	19,586	18,000	17,523	97%	89%	1,729	7,914	9,643	18,000	54%
<b>Independent Living</b>			38%			Nov				32%
Homemaker Units of Service	1,616	3,333	784	24%	49%	128	449	577	2,500	23%
Escorted Transportation Units of Service	1,548	2,186	792	36%	51%	174	480	654	1,739	38%
Respite Units of Service	2,600	3,315	992	30%	38%	176	672	848	2,468	34%
Community Support/Senior Companion Units of Service	1,322	1,090	1,060	97%	80%	107	456	563	1,353	42%
Personal Care Units of Service	1,150	465	358	77%	31%	12	72	84	435	19%
<b>Benefits Counseling</b>						Dec				
Benefits Counseling Hours of Service	N/A	N/A	600	N/A	N/A	52	272	324	450	72%
<b>Ombudsman</b>						Dec				
Ombudsman consults/cases opened	1454	1,100	1,034	94%	71%	69	507	576	1,100	52%